



International Coordinating Council of
Aerospace Industries Associations

ANNUAL REPORT 2024



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I am thrilled to serve as ICCAIA's new Chairman for the next two years. First of all, I would like to thank Eric Fanning, President and CEO of AIA, who splendidly fulfilled this role these last two years in the framework of the rotating ICCAIA Chairmanship between AIA and ASD. I am looking very much forward to the further cooperation with him and all ICCAIA members.

As ICCAIA continues its expansion, we look forward to a productive time ahead. ICCAIA's work is vital not only for the aerospace industry but for the billions of people who rely on aviation every year.

As the incoming Chair of ICCAIA in 2025, I will continue to advocate for policies and regulations at global level that support both growth and sustainability in aviation, via a continuous and constructive dialogue with governments, regulatory bodies, and other stakeholders.

Having said this, I am in particular honoured to represent the collective voice of global aerospace manufacturers and service providers towards ICAO, which remains the most important platform to contribute to and shape the development of international standards and regulations necessary for the safety, security, efficiency, and sustainability of air transport. Together with ICAO and our global partners, we will ensure that aviation remains a safe, sustainable, and accessible mode of transport for the future.

Last but definitely not least, I would like to thank the entire staff of ICCAIA in Montreal. Without their hard work and profound expertise, our association would not be such a key factor for global aviation regulation and policies. As a Chairman, it is a huge privilege to be able to count on such a great team for all these tremendous challenges lying ahead of us.

***Jan Pie, Chair, ICCAIA
& Secretary General of ASD***



Strategic Objectives

One of the first key actions for ICCAIA in 2024 was the agreement of a new five year strategy for the organization. This brings the strategic objectives in line with the changing priorities of the industry, in particular focusing on innovation and new technologies and closing completed objectives around the COVID pandemic.

Member Outreach

In April, ICCAIA participated in the Global Aviation Skills Taskforce was held in Sao Paulo, Brazil. We took the opportunity to visit Embraer in nearby San Jose de los Campos to discuss subjects such as certification and CNS/ATM challenges face to face. In November 2024, ICCAIA was able to pay a visit to each of our Members and Associate Members in the Asia region, starting in Malaysia with the Malaysia Aerospace Industry Association (MAIA), participating in the Second International Conference on Green Aviation as a guest of the Chinese Society of Aeronautics and Astronautics (CSAA) in Chengdu, China, passing through Japan with the Society of Japanese Aerospace Companies (SJAC), and rounding off with the Association of Aerospace Industries, Singapore (AAIS). With our expanding team, we will continue to reach out to visit our members in coming years.

ICCAIA Expansion

The first year of ICCAIA's expansion project has now been completed successfully. An inauguration event was held with representatives of the funding partners in September 2024 to celebrate the relationship and the growth of ICCAIA. Two new Directors were hired during the first year; both are now operational and have taken on much of the day-to-day work in the organisation, including participation in meetings on all subjects. The second phase commenced in November 2024 with the recruitment of a Director of Membership, Marketing and Communications, who is already making a big impact in helping the organization arrange its first ever Conference and AGM in 2025, alongside improving its external communications.



Distinguished guests and speakers included Eric Fanning, Chair of ICCAIA, ICAO's Secretary General and President, Stephane Paquet, CEO of Montreal International, Sara Veilleux and Inji Yoghmour from the Quebec Ministry of International Relations and La Francophonie.

Participation in ICAO Events

Alongside many panels and working groups, a significant event in the 2024 Calendar was the 14th Air Navigation Conference. This brought together nearly nine hundred delegates, addressing key issues in global aviation. The Conference strongly emphasized embracing technological advancements, towards the achievement of the Long Term Aspirational Goal (LTAG) with agreement on the need for harmonized regulatory frameworks to manage emerging technologies, including electric and hybrid propulsion. Delegates recognized workforce challenges and the importance of socioeconomic diversity and inclusion in the aviation sector to ensure a robust workforce of the future.

Another significant outcome was the call for enhanced mitigation of Global Navigation Satellite System (GNSS) interference, encompassing both deliberate actions like jamming or spoofing, and unintentional disruptions. The conference also made commitments to support ICAO's priority focus areas and planning approach. This included enhanced strategic alignment of the Global Aviation Safety Plan (GASP) and Global Air Navigation Plan (GANP). These commitments ensure that collective efforts in all these areas and beyond are strategically focused and effectively coordinated.

Delegates acknowledged the growth of the higher airspace and space transport industries, pushing for enhanced coordination and collaboration between space and aviation sectors, and also agreed the need for more work on developing technologies such as hyperconnected air traffic management and connected aircraft.

The papers presented by ICCAIA were met with support from member states and international organizations, reinforcing the value of their contributions. Overall, the conference outcomes were deemed successful, with meaningful progress made across several areas, laying the foundation for the 42nd ICAO Assembly in 2025.

Many of ICCAIA's members also participated the first ICAO Advanced Air Mobility Conference, as exhibitors, panellists and speakers. A major theme throughout the symposium was the safe and efficient integration of AAM into conventional airspace systems. ICCAIA contributed speakers and panelists to the discussions, providing valuable insights and emphasizing the industry's perspectives.

Two Industry Consultative Forum sessions were also held with the ICAO Council, providing ICCAIA's members an opportunity to speak directly to Council members on the subjects of Integrated Airspace Innovation and Digitalization and Cybersecurity.

Full Members



- > Aerospace Industries Association (AIA)



- > Aerospace Industries Association of Brazil (AIAB)



- > Aerospace Industries Association of Canada (AIAC)



- > Aerospace, Security and Defence Industries Association of Europe (ASD)



- > The Society of Japanese Aerospace Companies (SJAC)

Associate Members



- > Association of Aerospace Industries, Singapore (AAIS)



- > Chinese Society of Aeronautics and Astronautics (CSAA)



- > FEMIA of Mexico



- > Malaysia Aerospace Industry Association (MAIA)

ICCAIA unites international aerospace industry associations, creating a global community of over three thousand companies involved in the design, development, manufacture, and in-service support of aeronautical and space products and technologies, including ground-based systems and services.

Our Priorities

Through membership with ICCAIA, associations ensure their members are effectively represented in global policy discussions, with their voices heard on the international stage. As a recognized observer at the International Civil Aviation Organization (ICAO),

ICCAIA directly conveys the perspectives of the manufacturing and services community to global policymakers. This involvement provides members with valuable opportunities to participate in key ICAO events, panels, and working groups. Our members contribute their expertise to over fifty ICAO panels and groups, addressing critical topics such as airworthiness, communication, navigation and surveillance/air traffic management, security, environmental sustainability, facilitation and health, cybersecurity, and advanced air mobility.

Membership Benefits:

⇒ Highlighting local and regional challenges and opportunities

⇒ Ensuring that manufacturers' views are heard when global policy is formulated

⇒ Bringing together the world's experts to recommend new channels for development and innovation

⇒ Providing a supportive community to help and advise on ideas, issues, and challenges

⇒ Strengthening the global voice toward better, outcome focused, flexible regulation

⇒ Advancing the agenda on sustainability, digitalization and innovation



ICCAIA's new strategic objectives set specific goals for both external issues such as the resilience of the industry, and internal strength of the organization.

Build on ICCAIA's position as a preeminent industry association within the United Nations system, with other international standard-setting bodies and with Member States.

Promote the resilience of the future aerospace and aviation industry, including in the areas of Sustainability (Net Zero policy), Workforce, Safety and Security and Resilience to Future Shocks.

Grow ICCAIA's membership and presence while ensuring its continued effective operation.

Minimize adverse regulatory impact and avoid market distortion.

Advocate for processes to allow for a regulatory framework compatible with the capabilities and needs of the manufacturer and service provider community.

Ensure appropriate representation and advocacy for technical and strategic subjects of interest to the sector.

2024 ICCAIA Committee Insights

ICCAIA COMMITTEES INSIGHTS: 2024 HIGHLIGHTS & ACHIEVEMENTS

Aircraft Noise and Emissions Committee

The Aircraft Noise and Emissions Committee (ANEC) started 2024 with a refresh of our five-year strategy after successful 2023 meetings (CAAF/3 and COP/28) that outlined global goals for sustainable fuels and mitigation of aviation climate impacts.

One revision of note increased focus on non-CO₂ emissions (NO_x, particulates, and other exhaust by-products emitted during flight) that can have climate and local air quality impacts. The severity and mechanisms of these impacts are poorly understood, and efforts to mitigate these impacts need to be appropriate and correctly directed.



ANEC experts crafted a position detailing our preferred approach to developing understanding and means to control non-CO₂ emissions. This formed the basis for multiple ICCAIA requests for ICAO's Committee on Aviation Environmental Protection (CAEP) to define how non-CO₂ efforts should be addressed by ICAO; an effort that continues at the CAEP/13 meeting in February 2025.

Efforts to update the CAEP standards controlling the emissions of oxides of nitrogen (NO_x) concluded that airborne NO_x levels are adequately controlled by the existing LTO NO_x standards. LTO NO_x limit will likely be revised in the next CAEP cycle and will be integrated with our efforts to better understand non-CO₂ emissions. For engines expected to power the next generation of supersonic aeroplanes, ICCAIA helped develop draft standards for emissions that are far more stringent than existing standards. The draft standards will hopefully be finalized in 2028.

Reduction of CO₂ emissions remained an ANEC focus during 2024. Most of this was manifest in work on the Integrated Dual Stringency for noise and CO₂ reduction. After overcoming some data sharing issues arising due to sanctions, the ANEC provided

technical data to the CAEP process to allow the technical analysis of noise and CO₂ emissions stringency options. Based on this analysis, and some additional considerations, we are confident an acceptable outcome is possible at the February 2025 CAEP/13 meeting.

Two workshops were held in Montreal to find a consensus position for noise and CO₂ stringency-setting, balancing technical feasibility with climate ambition, that guides our current advocacy at CAEP. This work was complicated by changes proposed to the Changed Product Rule, that could modify the conditions that trigger the need for new type certification...

ICCAIA experts also spent 2024 supporting development of a methodology for monitoring progress on the ICAO long term aspirational goal (LTAG) for reducing carbon emissions from aviation. All CAEP resources are leveraged to evaluate progress toward the ICAO/Industry goal of net zero carbon by 2050. ANEC experts also contributed to the Working Group on Carbon Offsetting and Reporting Scheme for International Aviation (CORISIA) and advocated for the rapid expansion of sustainable aviation fuel availability.

ICCAIA representation on the Basel and Stockholm Conventions was also ongoing. The complexities of rule interactions among different States have been challenging, with some states leaving out aerospace exemptions for some flame retardants. We worked to manage a ban on most uses of some paraffins, with exceptions for certain aerospace uses. An increased understanding of how future rules on "forever chemicals" will impact aviation is also underway, as some bans will impact critical safety-related uses.

2024 marked the first year with investigations of emerging technology aircraft (ETA). As many advanced air mobility vehicles are expected to be electric, noise is the primary environmental concern. ICCAIA experts, including some from new ICCAIA member companies, are supporting development of new noise standards.

Lastly, a standard for landing and takeoff (LTO) noise for supersonic aeroplanes has been prepared for approval at CAEP/13. This is the first meaningful LTO noise standard for supersonic aeroplanes; requiring future supersonic aeroplanes to meet the same levels as current subsonic aeroplanes, with improvements to the testing procedures to better reflect actual operations.

ICCAIA COMMITTEES INSIGHTS: 2024 HIGHLIGHTS & ACHIEVEMENTS

Airworthiness Committee

2024 Achievements and 2025 Outlook

The ICCAIA Airworthiness Committee is committed to shaping global airworthiness standards by contributing to critical discussions within ICAO panels. In June 2024, the committee convened in Washington, D.C., ahead of the FAA-EASA International Aviation Safety Conference. The meeting was hosted by the Aerospace Industries Association (AIA) and it provided an opportunity to showcase the breadth of activities taking place across the panels and their respective working groups overseen by the Airworthiness Committee. The committee also met virtually four times throughout the year, offering opportunities to highlight latest updates and collaborate among members.

Looking ahead, the committee will reconvene on March 26, 2025, in Montreal, preceding the ICCAIA Conference and Board meeting. To ensure inclusivity, this session will also offer virtual access for members unable to attend in person.

Airworthiness

The ICAO Airworthiness Panel oversees three active Working Groups (WGs) addressing key areas of aviation safety and regulation. WG1, dedicated to Continuing Airworthiness, focuses on maintenance, repair, and overhaul (MRO) from a manufacturer's perspective. WG2, which handles Initial Airworthiness, has made notable progress in harmonizing the classification and definitions of VTOL and powered-lift aircraft while also advancing regulatory frameworks for aircraft health monitoring and the Connected Aircraft Concept. Meanwhile, WG4, centered on Products, contributed to technical reviews of SARPs amendments, with particular emphasis on Electric and Hybrid Propulsion Systems (EHPS) and the harmonization of certification procedures and specifications.

Safety Management

The Safety Management Panel has been actively working to enhance the implementation and expansion of Safety Management Systems (SMS) and the Global Aviation Safety Plan (GASP). For the first time, ICAO's GASP Study Group introduced a Safety Intelligence Manual, providing a framework to extract meaningful data from service providers, and establishing a foundation for a common language and framework for safety intelligence, paving the way for future developments.

ICAO Accident Investigation

The Airworthiness Committee has actively supported ICAO's efforts to enhance accident investigation processes under Annex 13. ICCAIA is working to emphasize the importance of timely investigations and quality final reports as vital safety resources.

During the December 2024 Accident Investigation Symposium in Abu Dhabi, ICCAIA presented industry perspectives, highlighting OEM commitments to supporting Regional Accident Investigation Organizations (RAIOs) and fostering international collaboration. The symposium reinforced the need for standardization and enhanced state cooperation in accident investigations.

Aerodrome Design and Operations

ICCAIA expertise in the Airport Design and Operations Panel has been focusing on the infrastructure requirements for accommodating emerging aircraft technologies. A key achievement in 2024 was the establishment of the Airport Compatibility of Alternative Aviation Fuels Task Force (ACAAF-TF), which is analyzing the operational impacts of hydrogen and battery-powered aircraft. This initiative aims to develop new Concepts of Operations (CONOPS), job cards, and standards, aligning with the Long-Term Aspirational Goal (LTAG) for aviation sustainability.

Personnel Training and Licensing Panel

The Personnel Training and Licensing Panel oversees eight working groups with topics ranging from automation (vs. manual flying skills), to integration of competency-based training and assessment, to simulation training devices, language, age factors, ATC simulation, and more.

Ongoing Initiatives

The ICCAIA Airworthiness Committee has also been engaged in several ongoing projects:

Integrated Risk Management (IRM): In 2024, ICAO launched a Study Group on IRM to address multidisciplinary risks spanning safety, security, airworthiness, and operations. ICCAIA nominated experts to ensure manufacturing concerns are represented.

Runway Overrun Awareness and Alerting Systems (ROAAS): The committee continues to monitor regulatory timelines and certification challenges associated with implementing ROAAS requirements, ensuring alignment among stakeholders.

Aircraft Halon Cargo Replacement: The phase-out of Halon in cargo compartments remains a pressing issue. Manufacturers, supported by the Cargo Compartment Halon Replacement Advisory Group, are navigating complex challenges to find safe, effective alternatives.

Changed Product Rule (CPR): While not a direct relationship with ICAO, the committee has membership on the U.S. FAA's Changed Product Rule (CPR) Aviation Rulemaking Committee (ARC) and maintains a focus on the impacts that future CPR rulemaking may have, such as when manufacturers must adapt existing aircraft fleets to implement new ICAO mandated technologies (e.g., ROAAS, GADSS-ADT, etc.), or where new environmental standards may limit a manufacturer's opportunities to expand their product lineup.



ICCAIA COMMITTEES INSIGHTS: 2024 HIGHLIGHTS & ACHIEVEMENTS

CNS/ATM Committee

The CNS/ATM Committee coordinates the work of ICCAIA to support 17 different ICAO technical panels, advisory groups, study groups and task forces in the areas of communication and navigation systems and air traffic management. In 2024, the Committee dealt with several key issues including :

GNSS Interference and Spoofing

The global navigation satellite system (GNSS) is a fundamental element for providing communication, navigation and surveillance (CNS) and air traffic management (ATM) services worldwide. Positioning and timing information provided by GNSS is used by numerous aircraft avionics systems. In recent years, there has been a steep increase in reported events of GNSS signal spoofing or jamming, particularly since late 2023. Spoofing in particular is a concern, since it potentially causes GNSS receivers to compute incorrect position, navigation and timing data. The CNS/ATM committee co-authored a working paper with ICCAIA, IATA, IFALPA, IFATCA, and IFATSEA for the 14th Air Navigation Conference (July 2024). The Committee co-chairs also engaged in coordination with IATA which ultimately resulted in delivery of a "Sky Talk" seminar on GNSS Interference at 14th Air Navigation Conference. Further briefings and communications are planned in conjunction with industry partners for 2025.

Extended Minimum Crew Operations (eMCO)

eMCO proposes an aircraft operation with a minimum flight crew composition of two pilots during which extended periods of the cruise phase is conducted with one pilot at the controls while the other pilot(s) is(are) resting in a specifically designed rest area. eMCO is conducted only in an aircraft certified accordingly. A holistic, hazard-oriented, iterative and robust methodology is needed to demonstrate the safety of eMCO. An ad-hoc group was formed to coordinate an ICCAIA position and plan of action concerning eMCO, including identifying all areas that need additional work and research. This work is ongoing into 2025.

Wake Energy Retrieval (WER)

WER is also known as formation flying where fuel efficiency is gained by having one airplane fly in the wake of another airplane. Trial flights have been conducted and a concept of operations developed. An ad-hoc group was formed to coordinate ICCAIA's position and efforts relative to WER.

True North

ICAO has launched an initiative to study moving from use of magnetic North to True North by 2030. The lead up to the ICAO decision to launch the True North Advisory Group (TRUE-AG) included a survey for which the CNS/ATM committee

coordinated the ICCAIA response. The ICAO group is conducting a feasibility study on the subject and identifying possible impacts including during a transition phase. The committee set up an ad-hoc activity to coordinate ICCAIA's position on the transition to True North and to coordinate ICCAIA's work in this area. The nominated ICCAIA member of the Advisory Group was subsequently chosen to co-chair Advisory Group for ICAO and continues to lead a sizeable ICCAIA delegation of advisors as the group progresses.

Hyper Connected ATM (HCATM) and Connected Aircraft

HCATM is being defined with the objective to allow using commercial cabin connectivity in addition to safety protected spectrum links with dedicated mechanisms to convey safety communications, with no impact and no new specific requirements on commercial connectivity systems. CNS/ATM Committee led the development of a paper describing the concept for the 14th Air Navigation Conference. The Conference identified the need for more work to mature the concept and address concerns such as the potential for interference.



ICCAIA COMMITTEES INSIGHTS: 2024 HIGHLIGHTS & ACHIEVEMENTS

Health, Facilitation and Crisis Response Committee

Committee Summary

In 2024, the ICCAIA Health, Facilitation, and Crisis Response (HFCR) Committee played a vital role in shaping coordinated industry positions on aviation facilitation, public health, and health-related safety concerns.

The committee is tasked with contributing to the development of a crisis response framework and response mechanism at ICAO and offering industry expertise on guidance material to ensure safety concerns and best practices are adequately represented.

Key contributions are also expected in the development of passenger health-related Standards and Recommended Practices (SARPs) and the creation of a framework to respond to future health crises. The committee also leverages expertise to model experience on virus transmission for future use and actively advocates for health measures in air travel, such as disinfection, disinsection, risk assessments, identification of key workers, and travel restrictions.

Through these efforts, the HFCR Committee reaffirmed its commitment to promoting health and safety within the global aviation industry.

2024 Committee Highlights and Key Activities

This year, the HFCR Committee actively participated in the Collaborative Arrangement for the Prevention and Management of Public Health Events in Civil Aviation (CAPSCA).

The committee contributed to the five newly formed CAPSCA working groups, **MANUAL**, **PREPARE**, **INNOVATE**, **IMPLEMENT** and **PATIENT**, tasked with defining a comprehensive framework to address future health crises. Following the kick-off meeting in

May 2024, ICCAIA ensured at least one expert participated in each group, the aim being to present a final CAPSCA report at the ICAO 42nd Assembly in 2025.

In February 2024, the HFCR Committee engaged in ICAO's Facilitation Panel, where new and revised SARPs were adopted, including relocating existing health-related SARPs to Chapter 10 for Amendment 30 to Annex 9 – Facilitation. The Panel was also advised of relevant Facilitation-related developments in the United Nations and other international organizations, impacting on ICAO's FAL Programme and considered reports of the Working Group on Annex 9 and the one on Guidance Material.

Further efforts included participation in the Working Group on Assistance to Aircraft Accident Victims and their Families. This new Working Group is tasked with developing relevant guidance material in line with Standard 8.47 in Annex 9 and other relevant ICAO Annexes to assist States in implementing the relevant provisions. Members from the HFCR Committee also contributed to the associated symposium, held from November 26th to 28th in the Netherlands.

Accessibility in international civil aviation was another area of focus for the HFCR Committee. Members participated in the ICAO Working Group on Accessibility and attended the first ICAO/IATA/ACI Joint Symposium on Accessibility, held from December 2nd to 3rd, 2024.

Through these activities, the HFCR Committee has reinforced its commitment to enhancing global aviation safety, health, and accessibility while fostering collaboration among industry stakeholders. As 2025 starts, the committee's work continues to align with ICAO's strategic objectives and broader international goals.

ICCAIA COMMITTEES INSIGHTS: 2024 HIGHLIGHTS & ACHIEVEMENTS

Security Committee

In 2024, as in the previous years, the Security Committee continued its robust engagement in cybersecurity-related activities, reflective of the growing digital transformation and connectivity to meet Capacity, Safety, Aviation physical/cyber-security and environmental challenges.

Throughout the year, numerous initiatives were executed, spearheaded by two major panels dedicated to the subject, the Cyber Security Panel and the Trust Framework Panel, alongside activities by the Communication, Navigation, and Surveillance Panels. These efforts aimed to better integrate cyber security into the Strategic Security Plan (GASeP issue 02) and to equip air transport stakeholders with a better understanding of the cybersecurity risks (e.g. Global Cyber Risk Considerations / Doc 10209), to enhance their ability to prevent and respond to cyber attacks through publication of guidance manuals (3 published on the ICAO website, 5 under review and 9 under development), to secure digital exchanges between them (Trust Framework Concept), and to secure aeronautical communications (e.g., ATN/IPS) and satellite-based navigation capabilities.

In addition to ICAO activities, the Security Committee has actively contributed to the activities of the rForum in conjunction with IATA, working to align the understanding of risks and the practical solutions to be put in place to ensure a continuum of security between OEMs and operators. The Ad Hoc Cybersecurity Coordination Committee (AHCCC) convened its second session, continuing the alignment and rationalization of ICAO's cybersecurity efforts scattered in many entities.

Due to a lack of a nominated ICCAIA observer, the Committee has only very occasionally participated in AVSEC panel activities, while monitoring the work related to Aircraft Operations Over or Near Conflict Zones which persists as a significant challenge.

Committee members contributed to the preparation of ICAO Fourteenth Air Navigation Conference (AN-CONF/14), which addressed cyber-security matters through its agenda item 4,

thus demonstrating the awareness that cybersecurity is an integral part of air navigation activities and must be addressed in a multi-disciplinary manner. They also took part in the development of the Muscat Declaration, ratified during ICAO Security Week 2024 held in Oman at the end of last year, which reiterated the imperative need for security issues to be addressed by the industry players and the need for cooperation and the provision of resources.

Finally, with regard to the ICCAIA's internal activities, the committee held 2 sessions and engaged in a dialogue with the airworthiness committee on Integrated Risk Management (State Letter ref. AN8/19-IND/24/5), culminating in a proposed paper for discussion. Preliminary reflections were made on subjects that would be relevant to put on the table at the next ICAO General Assembly, building on the conclusions of (AN-CONF/14) and the ICAO Security Week .

ICCAIA COMMITTEES INSIGHTS: 2024 HIGHLIGHTS & ACHIEVEMENTS

Advanced Air Mobility (AAM) Advisory Group

Advanced Air Mobility: Updates from the ICAO AAM Study Group

Advanced Air Mobility (AAM) is transforming aviation with groundbreaking innovations. However, globally harmonized standards, certifications, and infrastructure are essential for safe, sustainable, and coordinated implementation.

ICAO AAM Study Group: Driving a Unified Framework

In response to AAM's growing significance, ICAO launched the AAM Study Group in spring 2023, following a 41st ICAO Assembly mandate. The group's mission is to establish a strategic, globally harmonized framework for AAM. Key objectives include:

- ◆ Conducting a comprehensive assessment and gap analysis of the AAM ecosystem.
- ◆ Identifying critical enablers for Urban Air Mobility (UAM).
- ◆ Evaluating emerging traffic management systems and required ground infrastructure.

The group provides ICAO member States with recommendations and guidance to support AAM technologies' safe and efficient adoption.

ICCAIA AAM Study Group: Supporting Industry Collaboration

Over the past two years, the AAM Study Group has worked with ICCAIA and 34 other stakeholders, including state authorities, industry leaders, and standards organizations. Key achievements include:

- ◆ Developing initial guidance for member States to facilitate early AAM implementation.
- ◆ Aligning efforts with ICAO panels such as the Remotely Piloted Aircraft System Panel (RPASP) and the Vertical Flight Infrastructure Working Group (VFIWG).

This collaborative approach underscores the importance of stakeholder engagement in shaping a unified AAM framework.

A Milestone Event: The First ICAO AAM Symposium

In September 2024, ICAO hosted its inaugural AAM Symposium at its Montreal headquarters, its most-attended event ever. Experts explored key themes:

- ◆ Regulatory frameworks.
- ◆ Technological advancements.
- ◆ Societal impacts.
- ◆ Sustainability in AAM.

The symposium underscored the Study Group's significance and global commitment to advancing AAM.



ICCAIA's Vice-Chair Mike Mueller participated in the one of the cornerstone discussions of AAM2024

Leadership Transition in the ICAO AAM Study Group

The 4th session of the ICAO AAM Study Group marked a leadership transition. ICCAIA extends gratitude to Kirsten Riensema (UK CAA) for her exemplary leadership as Chair and welcomes Dale Sheridan (Australia) as the new Chair, anticipating continued progress under her guidance.

Outlook for eVTOL Development in 2025

2025 is expected to be pivotal for eVTOL manufacturers as they focus on:

- ◆ Transitioning prototypes into certified, scalable products.
- ◆ Meeting stringent safety and performance standards.
- ◆ Advancing battery technologies for longer endurance.
- ◆ Integrating operations into evolving traffic management systems.

Collaboration with regulatory authorities is vital to harmonize certifications and address airspace and infrastructure challenges. Manufacturers must also align globally on sustainability and urban mobility solutions while building public trust through safety and innovation.

ICCAIA's AAM Study Group remains dedicated to supporting ICAO and stakeholders to achieve safe, reliable, and sustainable AAM operations.



Industry Insight

Civil Air Transport - Supporting 86.5 million jobs; Economic impact of \$4.1 trillion.

The latest edition of the important *Aviation: Benefits Beyond Borders* document, prepared by Oxford Economics, was released in December by the Air Transport Action Group (ATAG).

Oxford Economics' findings include that, globally, 1.7 million people are directly employed in the civil aerospace manufacturing and service sector – the part of the industry represented by ICCAIA. In all, over 35 million flights carry 4.4 billion passengers annually – or around 12 million passengers per day – in just over 29,000 aircraft. With this, the in-service fleet is now bigger than it was before the pandemic, and it can be noted that Cirium, used by many experts as a point of reference, recently forecast that 45,900 new aircraft will be needed between now and 2043.

ICCAIA, our member associations and several companies represented by ICCAIA made significant contributions to *Aviation: Benefits Beyond Borders*.

The full version of the document includes detailed regional and national analyses, and may be downloaded from here:

<https://aviationbenefits.org/downloads/aviation-benefits-beyond-borders-2024/>

The image features a background of a blue sky with soft, wispy clouds. In the foreground, there are curved, metallic-looking surfaces in shades of blue and white, suggesting the interior of an aircraft or a modern architectural space. The ICCAIA logo is prominently displayed in the upper right quadrant.

ICCAIA

International Coordinating Council of
Aerospace Industries Associations

If you are interested in becoming a member or would like more information, please reach out to Alexe Paré, our Director of Membership, Marketing and Communications, at apare@iccaia.org.